



# Excel-erating Your Cal Grant Processing



Sally Atlas  
California Student Aid Commission

# Why Use Excel?

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- Allows users to treat Cal Grant data like other types of data
- Sort – filter – create custom reports
- 1<sup>st</sup> step in automation – compare Excel report to FAMS
- Your ideas?

# How to Use Excel

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Download the Tool that you want to use:

1. Log on to WebGrants
2. Click on the Tools Menu (all users have access to the Tools Menu)
3. Find the Tool you wish to use
4. **Right** click on the link and save the file to a location on your computer (I like to use the desktop so I can find it again!)

## Tools

- ✦ Each of these tools involves downloading files that use external software. Some require that additional software be resident on the user's computer
- ✦ For best results, right click on the link and select the "Save" option.
- ✦ A Users Guide containing further descriptions and instructions for each of these tools is located in the Help Center

### Tools

### Description

✦ [Roster Data File Compare -- Delphi](#)

Provides comparisons between a previous roster data file and the current file

✦ [Excel Grant Roster Template -- for Excel '97](#)

Formats roster data files into a Microsoft Excel spreadsheet

✦ [Excel Grant Roster Template -- for Excel 2000](#)

Formats roster data files into a Microsoft Excel spreadsheet

✦ [Excel EL Verification Template](#)

Formats EL Verification data files into a Microsoft Excel spreadsheet

✦ [Excel Unclaimed Awards Template](#)

Formats Unclaimed Award data files into a Microsoft Excel spreadsheet

✦ [Excel GPA Template](#)

Create a Microsoft Excel file of GPAs and save it in the proper format for upload into WebGrants

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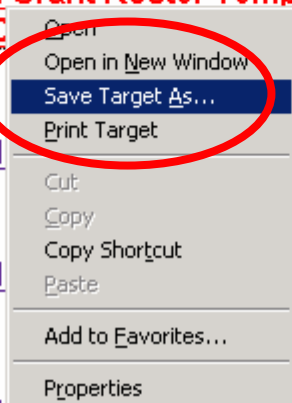
Formats EL Verification data files into a Microsoft Excel spreadsheet

◆ [Excel Grant Roster Template](#)

Formats Unclaimed Award data files into a Microsoft Excel spreadsheet

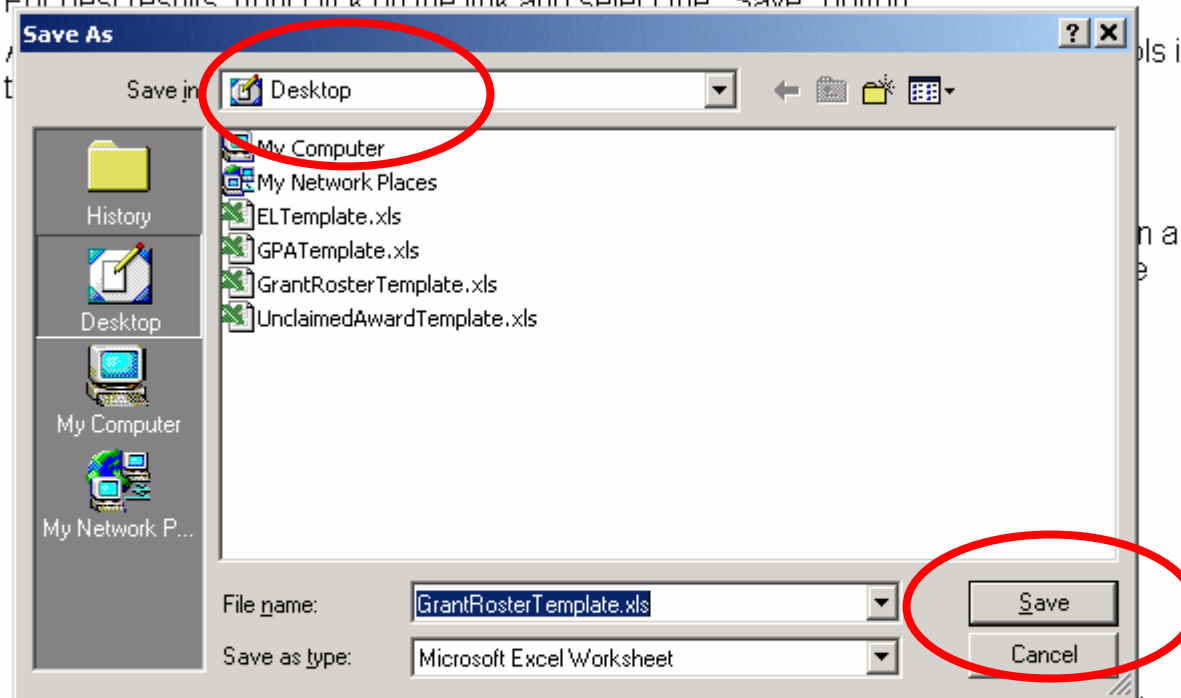
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- ◆ [Excel EL Verification Template](#)

Formats EL verification data files into a Microsoft Excel spreadsheet

- ◆ [Excel Unclaimed Awards Template](#)

Formats Unclaimed Award data files into a Microsoft Excel spreadsheet

- ◆ [Excel GPA Template](#)

Create a Microsoft Excel file of GPAs and save it in the proper format for upload into WebGrants

Next download the data file you wish to work with:

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1. Click on Data Transfer menu
2. Select Report Download
3. Find the data file you want
4. **Right** click and save to your computer.
5. Log out of WebGrants

## Data Transfer

✦ [File Upload](#)

✦ [Report Download](#)

✦ [SSN/ID Main](#)



## Report Download for BUTTE COLLEGE

- To view, select the Display/Download link.
- To download, right click on the Display/Download link and choose the "Save" option.
- All data columns can be sorted either ascending or descending order by clicking on the blue column headings.
- To compare two roster files, select Grant Roster for Report and Data File for Media Type.

School ID = <input type="text" value="00807300"/>	Acad Year = <input type="text" value="2004-2005"/>	Month = <input type="text" value="All"/>
Report = <input type="text" value="All"/>	Media Type = <input type="text" value="All"/>	<input type="button" value="GO!"/>

Report Date	Description	Media Type	Month	
30-NOV-04	Grant Roster	Data File	NOV	<a href="#">Display/Download</a>
29-NOV-04	Unable to Determine Ren Elig	Report	NOV	<a href="#">Display/Download</a>
29-NOV-04	Unable to Determine Ren Elig	Data File	NOV	<a href="#">Display/Download</a>
29-NOV-04	Automatic Leave	Report	NOV	<a href="#">Display/Download</a>
29-NOV-04	Automatic Leave	Data File	NOV	<a href="#">Display/Download</a>
24-NOV-04	Grant Roster	Data File	NOV	<a href="#">Display/Download</a>

## Report Download for SACRAMENTO CITY COLLEGE

- To view, select the Display/Download link.
- To download, right click on the Display/Download link and choose the "Save" option.
- All data columns can be sorted either ascending or descending order by clicking on the blue column headings.
- To compare two roster files, select Grant Roster for Report and Data File for Media Type.

School ID = 
 Acad Year = 
 Month = 
 Report = 
 Media Type =

Report Date	Description	Media Type	Month	
29-OCT-04	Education Level Verification	Data File	OCT	<a href="#">Retrieve File</a>
26-NOV-04	Monthly Payment Activity	Report	NOV	<a href="#">Retrieve File</a>
26-NOV-04	Accept/Reject	Report	NOV	<a href="#">Retrieve File</a>
26-NOV-04	Accept/Reject	Data File	NOV	<a href="#">Retrieve File</a>
24-NOV-04	Education Level Verification	Data File	NOV	<a href="#">Retrieve File</a>
24-NOV-04	Grant Roster	Data File	NOV	<a href="#">Retrieve File</a>
20-NOV-04	Accept/Reject	Report	NOV	<a href="#">Retrieve File</a>
20-NOV-04	Accept/Reject	Data File	NOV	<a href="#">Retrieve File</a>
19-NOV-04	Grant Roster	Data File	NOV	<a href="#">Retrieve File</a>

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https://webgrants.csac.ca.gov/DataTransfer/Report\_Download.asp?id=702&mode=dis...

California Student Aid Commission (Instance = saprd)

WebGrants System [GPA](#) [Student Info](#) [School Info](#) [Roster/Reconciliation](#) [Data Transfer](#)

[Data Transfer Main](#) [File Upload](#) [Report Download](#)

Month =

Media Type =  [GO!](#)

Month	
OCT	<a href="#">Retrieve File</a>
NOV	<a href="#">Retrieve File</a>
NOV	<a href="#">Retrieve File</a>
NOV	<a href="#">Retrieve File</a>
NOV	<a href="#">Retrieve File</a>
NOV	<a href="#">Retrieve File</a>
NOV	<a href="#">Retrieve File</a>
NOV	<a href="#">Retrieve File</a>
NOV	<a href="#">Retrieve File</a>
NOV	<a href="#">Retrieve File</a>

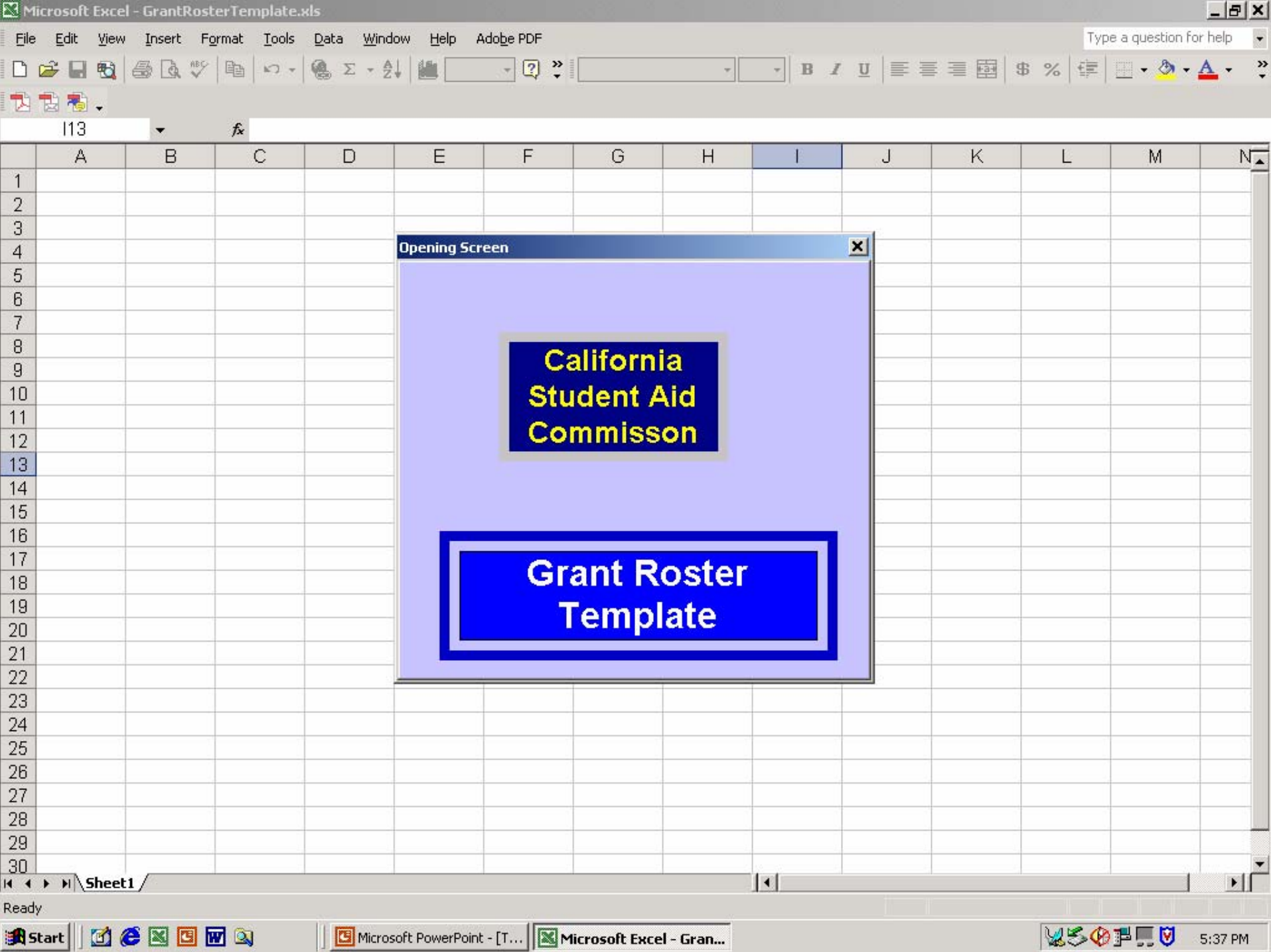
Display/Download

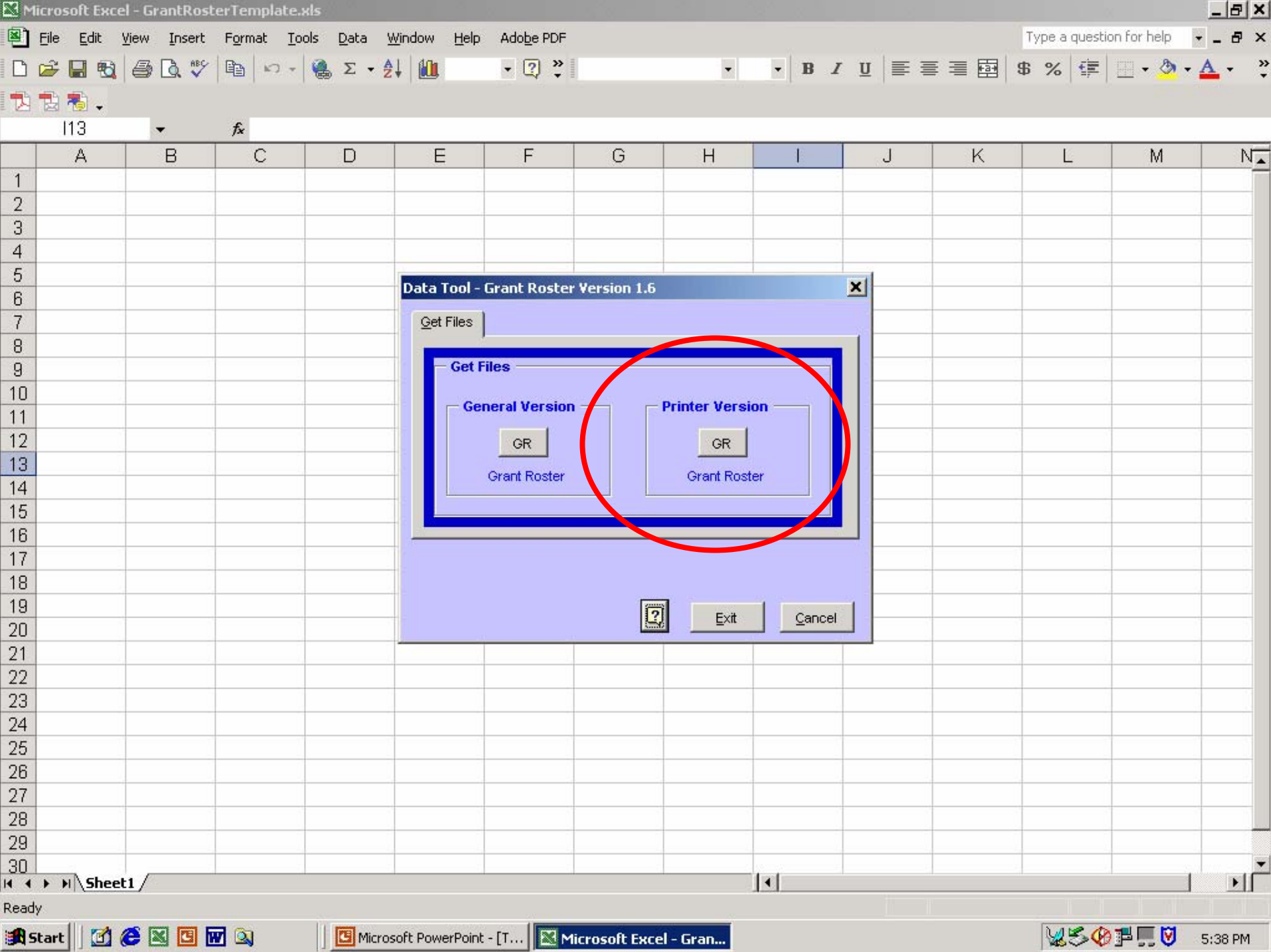
- Open
- Open in New Window
- Save Target As...
- Print Target
- Cut
- Copy
- Copy Shortcut
- Paste
- Add to Favorites...
- Properties

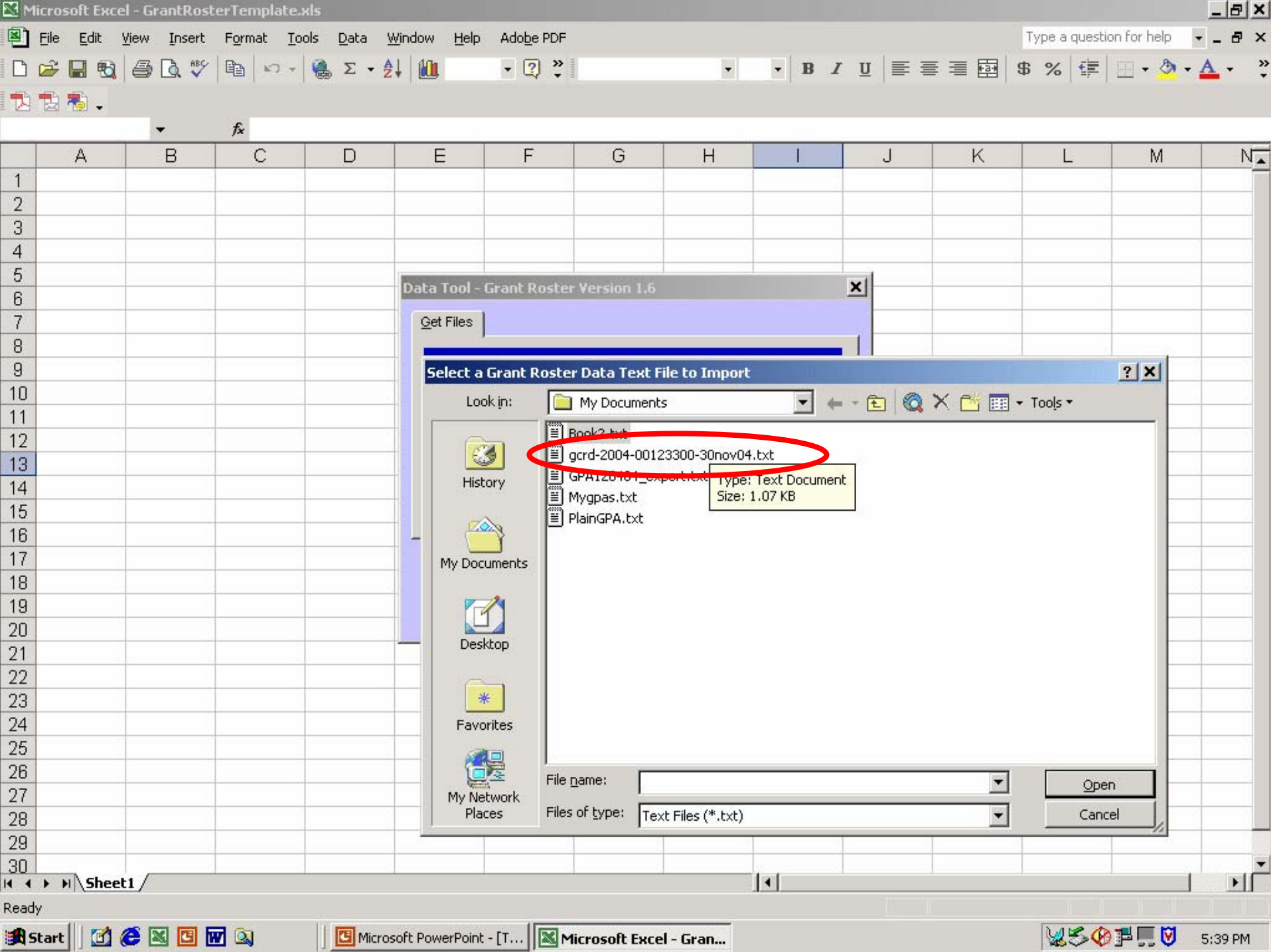
# Open Excel Tool

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- After you have closed WebGrants, find the tool that you downloaded (probably on your desktop!)
- Double click on the desktop icon or open the file through Excel.
- A blue box will pop-up, wait a few seconds and it will go away showing an option menu.
- Follow the instructions on the screen











The screenshot shows the 'Data Tool - Grant Roster Version 1.6' application. A red circle highlights a 'Microsoft Excel' dialog box in the foreground. The dialog box contains an information icon (a lowercase 'i' inside a speech bubble) and the text 'Get File Process is complete'. Below the text is an 'OK' button. In the background, the 'Get Files' window is visible, featuring a 'General Version' tab and a 'Printer Version' tab. The 'General Version' tab is active, showing a list of grant data. At the bottom of the application window, there are three buttons: a help button (a question mark inside a speech bubble), an 'Exit' button, and a 'Cancel' button.



▼

The screenshot shows a software window titled "Data Tool - Grant Roster Version 1.6". It features a "Get Files" tab. Inside the window, there are two side-by-side panels. The left panel, titled "General Version", contains a "GR" button and the text "Grant Roster". The right panel, titled "Printer Version", also contains a "GR" button and the text "Grant Roster". At the bottom of the window, there are three buttons: "OK", "Exit", and "Cancel". The "OK" button is highlighted with a red circle.

Sheet1 gcrd-2004-00123300-30nov04

# You are ready to roll...What do you want your data to look like?

---

## ■ Roster:

- Sort records
- Filter records
- Reconcile payments

## ■ GPA:

- Create a file to upload
- Fix rejects

## ■ Unclaimed Awards:

- Search for students
- Delete students already on your roster
- Merge into Word and send letters to students

## ■ EL Verification:

- Lucky you CCCs, you don't need to use this one!

# Data – Filter - AutoFilter

The screenshot shows the Microsoft Excel interface with the 'Data' menu open. The 'Filter' option is selected, which has opened a sub-menu. In this sub-menu, the 'AutoFilter' option is highlighted. Other options visible in the 'Data' menu include 'Sort...', 'Subtotals...', 'Validation...', 'Text to Columns...', 'PivotTable and PivotChart Report...', 'Import External Data', and 'Refresh Data'. The 'AutoFilter' sub-menu also shows 'Show All' and 'Advanced Filter...'. The background shows a data table with columns: Transaction Code, Action Code Flag, Section Indicator, and a list of names and birth dates. A callout box with a maroon border and text explains the purpose of AutoFilter.

Use to filter data by different columns without moving the original data

Transaction Code	Action Code Flag	Section Indicator	Gr	Security Flag	Last Name	First Name	Middle Initial	Date of Birth
1	GPPR		1		ABBOT	HANNAH	R	19780524
2	GPPR		1		ACKERLEY	STUART	E	19811207
3	GPPR		1		BADDOCK	VALERIE		19860211
4	GPPR		1		BAGMAN	MARA	R	19810614
5	GPPR		1		BAGMAN	OTTO	J	19841008
6	GPPR		1		BAGWELL	JEFF	A	19820620
7	GPPR		1		BASHIR	ALI	M	19801003
8	GPPR		1		BELL	KATIE	E	19620227
9	GPPR		1		BLANC	DIANNE	L	19680620
10	GPPR		1		BLOTTIS	FLOURISH	A	19830108
11	GPPR		1		BLUERERO	VANNETTE	L	19791230
12	GPPR		1		BONES	SUSAN	P	19830101
13	GPPR		1		BORGIN	MISTER	I	19851214
14	GPPR		1		BOUL			
15	GPPR		1		BOUL			
16	GPPR		1		BROO			
17	GPPR		1		CARE			
18	GPPR		1		CAUL			
19	GPPR		1		CEDE			
20	GPPR		1		CROC			
21	GPPR		1		CROU			
22	GPPR		1		DELA			
23	GPPR		1		FISZLEWICH	MOON	H	19841125
24	GPPR		1		GRUESOME	MARY		19850130
25	GPPR		1		GRUESOME	WIERDLY		19850313
26	GPPR		1		GUYEN	HIEUN	C	19770213
27	GPPR		1		HILLBILLY	GRANNY		19560719
28	GPPR		1		LAURENN	PHILLIP		19800618
29	GPPR		1		LITTLE LAMB	MARY	I	19740617
30	GPPR		1		LOUDROCK	KEITH	Y	19700721
31	GPPR		1		LYNCH	AIDEN	R	19741208
32	GPPR		1					

# Filter by Program Code

Microsoft Excel - GrantRosterTemplate.xls

File Edit View Insert Format Tools Data Window Help Adobe PDF

Type a question for help

100% Arial

A1 Transaction Code

	F	G	H	I	J	K	L	M	N	O	P	Q
	Social Security	Social Security Fla	Last Name	First Name	Middle Initial	Date of Birth	Program Code	Program Code Fla	Dependency Status	New-Renew Indicator	El Code	El Fla
1	12333018		ABBOT	HANNAH	R	19780620	(All)	-C1	I	N		2
2	12333020		ACKERLEY	STUART	E	19811003	(Top 10...)	-C1	I	N		2
3	12333008		BADDOCK	VALERIE		19860101	(Custom...)	-E1	D	N		1
4	12332805		BAGMAN	MARA	R	19810101	A	-C1	I	R		3
5	12332802		BAGMAN	OTTO	J	19841001	B	-E1	D	R		2
6	12333017		BAGWELL	JEFF	A	19820620	C	-C1	D	N		2
7	12333000		BASHIR	ALI	M	19861003	B	-C1	D	R		2
8	12332528		BELL	KATIE	E	19620221	C	-C1	I	R		3
9	12331179		BLANC	DIANNE	L	19680620	B	-C1	I	R		2
10	12331827		BLOTTIS	FLOURISH	A	19830108	B	-E1	D	R		3
11	12333023		BLUERERO	VANNETTE	L	19791230	C	-C1	I	N		2
12	12331830		BONES	SUSAN	P	19830101	B	-E1	D	R		1
13	12331826		BORGIN	MISTER	L	19851214	B	-E1	D	R		2
14	12331775		BOULDER	AARON	L	19570208	C	-C1	I	R		3
15	12331816		BOULDER	ROCKY	M	19760510	B	-C2	I	R		4
16	12331800		BROCK	MANDY	L	19711102	B	-C1	I	R		3
17	12331804		CAREW	ROD	L	19680813	C	-C1	I	R		1
18	12331787		CAULDWELL	OWEN	T	19830118	B	-E1	D	R		4
19	12331815		CEDENO	SHAWNA	E	19820515	B	-C2	D	R		3
20	12331184		CROCKFORD	DORIS	H	19730209	B	-C2	I	R		2
21	12331183		CROUCH	BARTEMIUS	J	19631017	B	-C2	I	R		2
22	12331178		DELACOUR	GABRIELLE		19570123	B	-C1	I	R		2
23	12331780		FISZLEWICH	MOON	H	19841125	B	-E1	D	R		2
24	12333862		GRUESOME	MARY		19850130	B	-C2	D	N		2
25	12331831		GRUESOME	WIERDLY		19850313	B	-E1	D	R		2
26	12333856		GUYEN	HIEUN	C	19770213	B	-C2	I	N		1
27	12331180		HILLBILLY	GRANNY		19560719	C	-C1	I	R		1
28	12331786		LAURENN	PHILLIP		19800618	B	-C1	D	R		4
29	12333022		LITTLE LAMB	MARY	I	19740617	C	-C1	I	N		1
30	12331802		LOUDROCK	KEITH	Y	19700721	C	-C1	I	R		2
31	12333855		LYNCH	AIDEN	R	19741208	B	-C2	I	N		2
32												

Ready

Start Tools.ppt GrantRosterTemplate... 11:51 PM

# Data - Sort

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- Sorts all records based on criteria selected.
- Sort, instead of filter, when you want to change the order of the data
- Example – sort by Pay Code to determine which students haven't been paid yet.



# Sort by Fall Pay Code

Microsoft Excel - GrantRosterTemplate.xls

File Edit View Insert Format Tools Data Window Help Adobe PDF

Type a question for help

A2 GPPR

	A	B	C	D	E	F	G	H	I	J	K
	Transaction Code	Action Code Flag	Section Indicator	Grant ID Number Flag	Grant ID Number	Social Security	Social Security Flag	Last Name	First Name	Middle Initial	Date of Birth
2	GPPR		1		C04050514	12333018		ABBOT	HANNAH	R	19780524
3	GPPR		1		C04050873	12333020		ACKERLEY	STUART	E	19811207
4	GPPR		1		E04039605	12333008		BADDOCK	VALERIE		19860211
5	GPPR		1		C03057145	12332805		BAGMAN	MARA	R	19810614
6	GPPR		1		E02000528	12332802		BAGMAN	OTTO	J	19841008
7	GPPR		1		C04054172	12333017		BAGWELL	JEFF	A	19820620
8	GPPR		1		C03085408	12333000		BASHIR	ALI	M	19801003
9	GPPR		1		C02075785	12332528		BELU	KATIE	E	19620227
10	GPPR		1		C03057326	12331179		BLANC	DIANNE	L	19680620
11	GPPR		1		E01000236	12331827		BLOTTIS	FLOUNISH	A	19830108
12	GPPR		1		C04069223	12333023				L	19791230
13	GPPR		1		E02039112	12331830				P	19830101
14	GPPR		1		E03015434	12331826				L	19851214
15	GPPR		1		C01056125	12331775				M	19570208
16	GPPR		1		C02087607	12331815				L	19760510
17	GPPR		1		C03051356	12331800				L	19711102
18	GPPR		1		C03077489	12331104				L	19680813
19	GPPR		1		E01032864	12331787				T	19830118
20	GPPR		1		C03082906	12331815				E	19820515
21	GPPR		1		C02091426	12331184				H	19730209
22	GPPR		1		C02091461	12331183				J	19631017
23	GPPR		1		C03057252	12331178				ELLE	19570123
24	GPPR		1		E02005682	12331180				H	19841125
25	GPPR		1		C04089028	12333802					19850130
26	GPPR		1		E03041074	12331831					19850313
27	GPPR		1		C04088407	12333856					19770213
28	GPPR		1		C03070525	12331180					19560719
29	GPPR		1		C01051424	12331786					19800618
30	GPPR		1		C04069210	12333022				I	19740617
31	GPPR		1		C03079318	12331802				Y	19700721
32	GPPR		1		C04088270	12333855				R	19741208

Sort by: Fall Total Amount Pa [v] [x] ?

Ascending [v] Descending [x]

Then by: [v] [x] ?

Ascending [v] Descending [x]

Then by: [v] [x] ?

Ascending [v] Descending [x]

My list has: [v] Header row [x] No header row

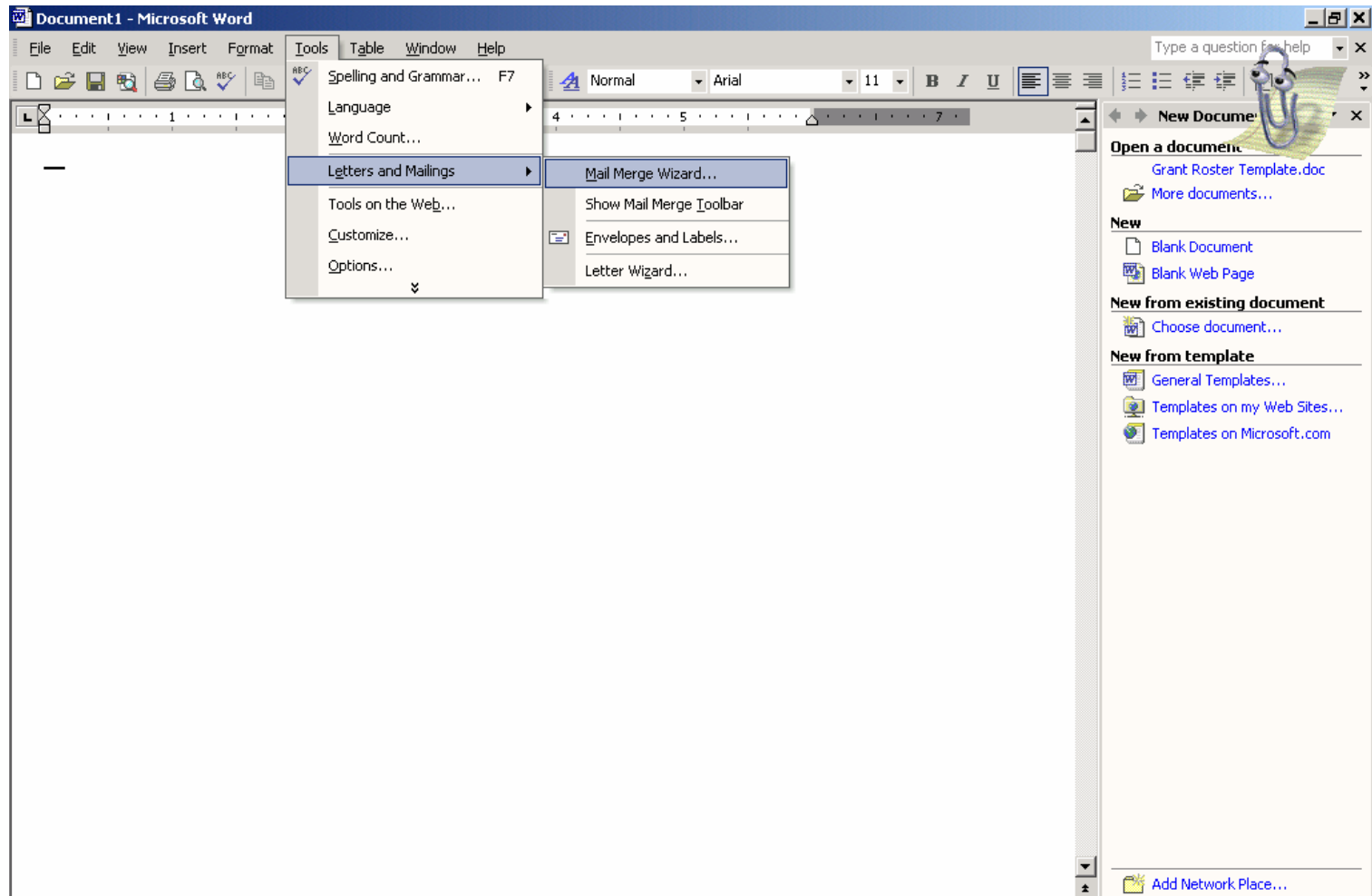
Options... OK Cancel

Sheet1 gcrd-2004-00123300-30nov04

Ready

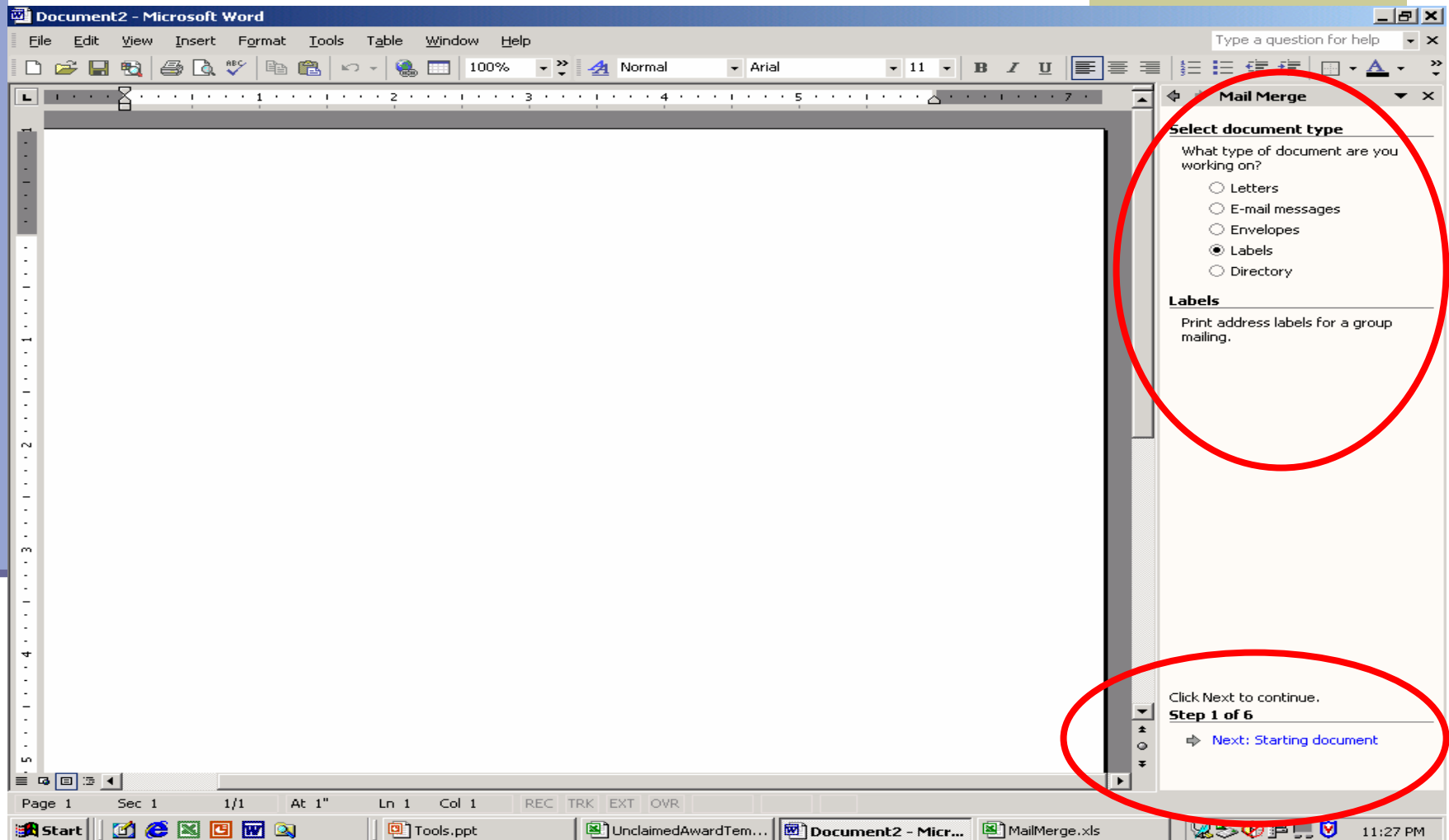
Start Tools.ppt GrantRosterTemplate... 11:56 PM

# Tools – Letters and Mailings – Mail Merge Wizard

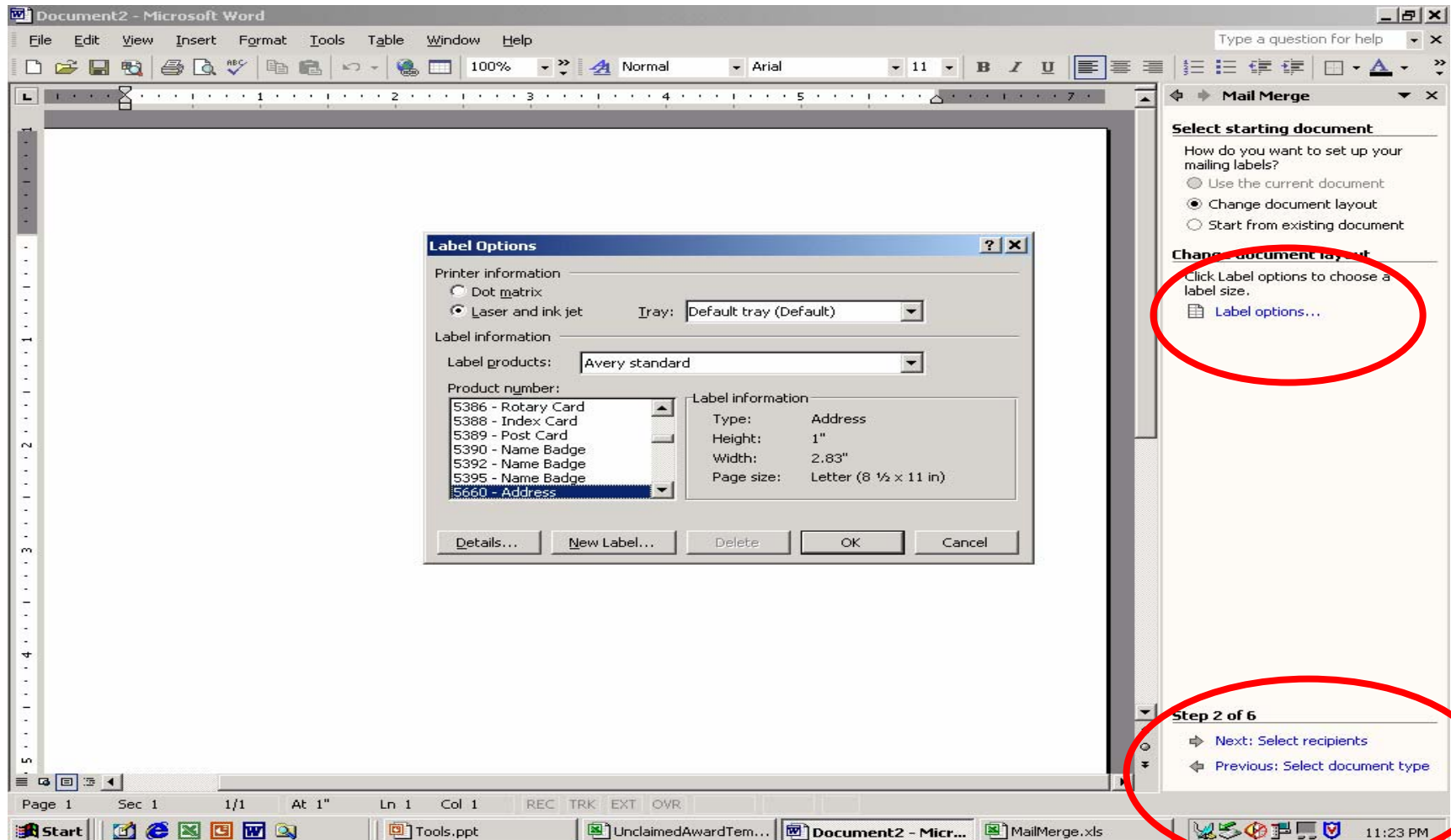




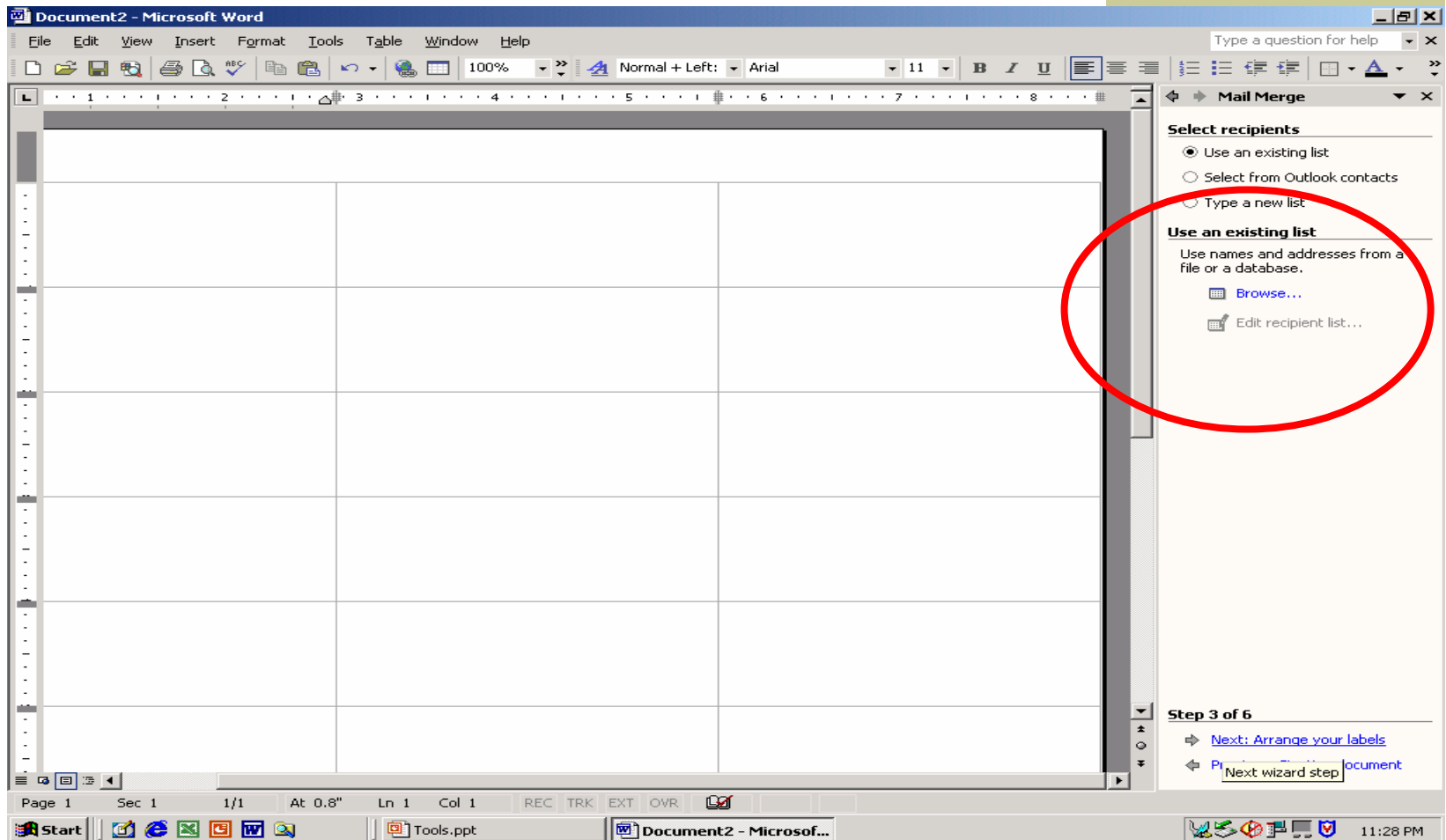
# Step 1 of 6 – Select media type



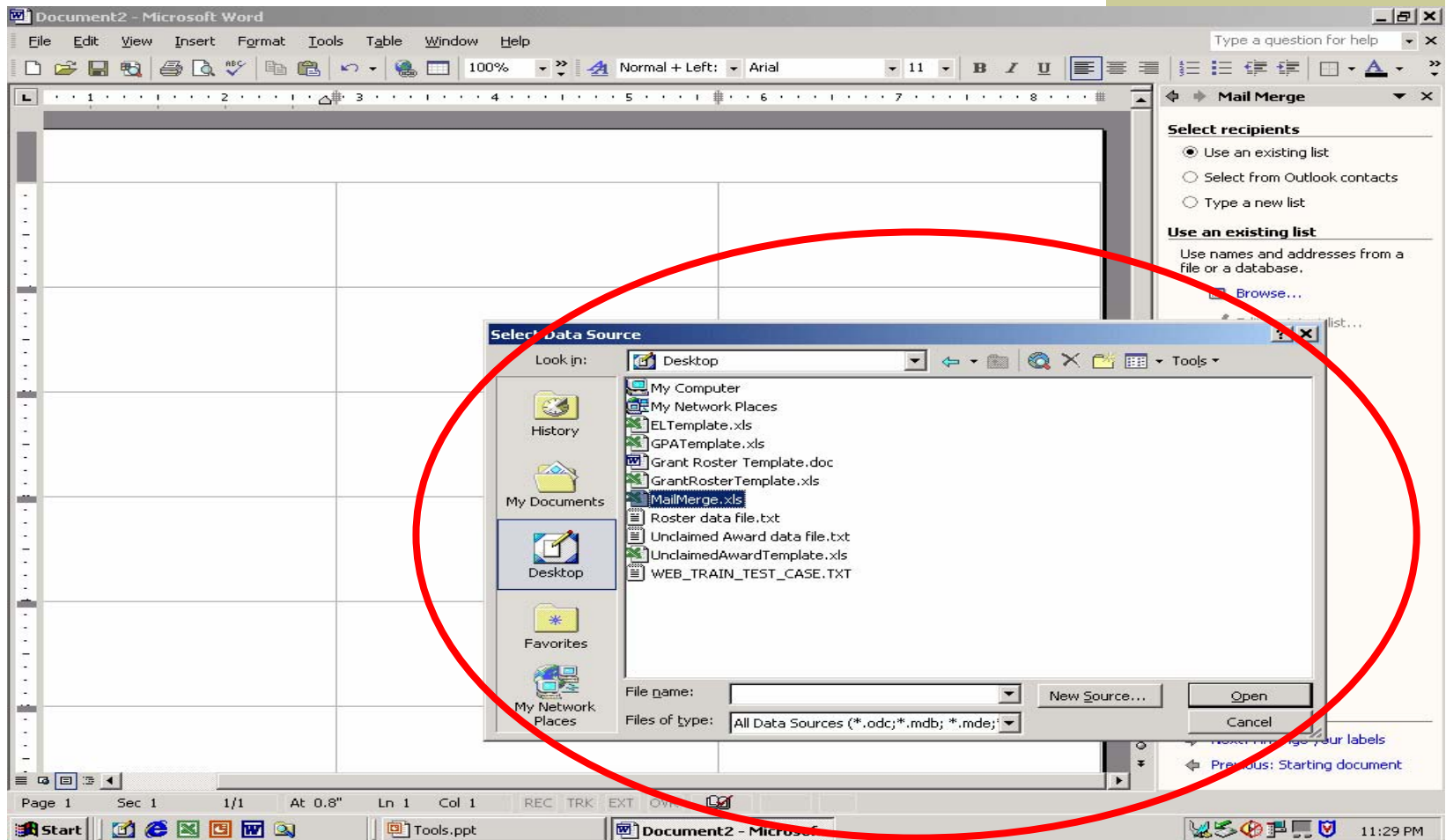
# Step 2 of 6 – Select starting document



# Step 3 of 6 – Select Recipients



# Step 3 of 6 – Select Recipients



# Step 3 of 6 – Select recipients

**Mail Merge Recipients**

To sort the list, click the appropriate column heading. To narrow down the recipients displayed by a specific criteria, such as by city, click the arrow next to the column heading. Use the check boxes or buttons to add or remove recipients from the mail merge.

List of recipients:

	Last Name	First Name	City	State	Zip Code	Email
<input checked="" type="checkbox"/>	BARRINGER	RAYNETTE	CITRU...	CA	95621	
<input checked="" type="checkbox"/>	BIRMINGHAM	AMY	SACR...	CA	95825	
<input checked="" type="checkbox"/>	BROOKS	RAYMOND	SACR...	CA	95823	
<input checked="" type="checkbox"/>	CHAVARIN	JULI	SACR...	CA	95831	
<input checked="" type="checkbox"/>	DAVALOS	MILDRED	ALAM...	CA	94501	
<input checked="" type="checkbox"/>	ELLIS	KIMBERLY	SACR...	CA	95823	
<input checked="" type="checkbox"/>	HAYES	ROSEMARIE	RIO LI...	CA	95673	
<input checked="" type="checkbox"/>	HAYES	TAMEKA	ALTAD...	CA	91001	
<input checked="" type="checkbox"/>	HO	SARAH	ROSE...	CA	95678	
<input checked="" type="checkbox"/>	HUMPHRIES	KASHINA	MODE...	CA	95351	
<input checked="" type="checkbox"/>	KAZANCHUK	MAUREEN	FOLSOM	CA	95630	
<input checked="" type="checkbox"/>	LITANG	LI ISTTN	NFVA...	CA	95959	

Select All Clear All Refresh Find... Edit... Validate OK

**Mail Merge**

**Select recipients**

- ☒ Use an existing list
- ☐ Select from Outlook contacts
- ☐ Type a new list

**Use an existing list**

Use names and addresses from a file or a database.

[Browse...](#)

[Edit recipient list...](#)

**Step 3 of 6**

Next: Arrange your labels

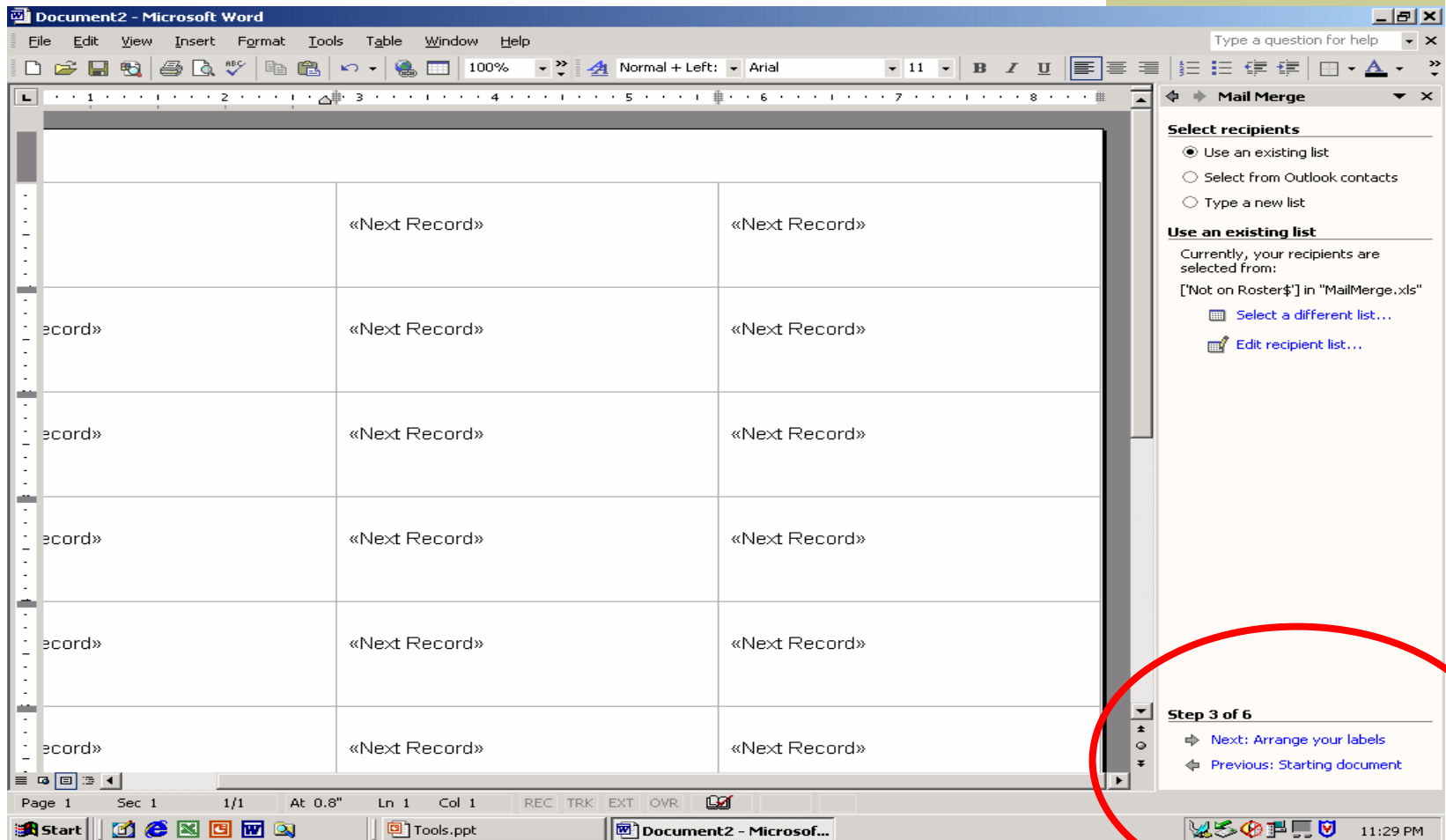
Previous: Starting document

Page 1 Sec 1 1/1 At 0.8" Ln 1 Col 1 REC TRK EXT OVR

Start Tools.ppt Document2 - Microsof...

11:29 PM

# Step 3 of 6 – Select recipients



# Step 4 of 6 – Arrange your labels

**Document2 - Microsoft Word**

File Edit View Insert Format Tools Table Window Help

100% Normal + Left: Arial 11 B I U

**Mail Merge**

**Arrange your labels**

If you have not already done so, lay out your label using the first label on the sheet.

To add recipient information to your label, click a location in the first label, and then click one of the items below.

- Address block...** (circled in red)
- Greeting line
- Electronic postage...
- Postal bar code...
- More items...

When you have finished arranging your label, click Next. Then you can preview each recipient's label and make any individual changes.

**Replicate labels**

You can copy the layout of the first label to the other labels on the page by clicking the button below.

**Update all labels**

**Step 4 of 6**

- Next: [Preview your labels](#)
- Previous: [Select Next wizard step](#)

Page 1 Sec 1 1/1 At 0.8" Ln 1 Col 1 REC TRK EXT OVR

Start Tools.ppt Document2 - Microsof...

11:30 PM



# Step 4 of 6 – Arrange your labels

Document2 - Microsoft Word

File Edit View Insert Format Tools Table Window Help

Normal + Left: Arial 11

100%

«Next Record»

**Match Fields**

Mail Merge has special features for easily working with addresses. Please specify address field components to simplify address insertion.

**Required information**

Last Name	Last Name
First Name	First Name
Courtesy Title	(not available)
Company	(not available)
Address 1	Address - 1st Line
City	City
State	State
Postal Code	Zip Code
Spouse First Name	(not available)

**Optional information**

Middle Name	Middle Initial
Suffix	(not available)

Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)

OK Cancel

**Insert Address Block**

Specify address elements

☒ Insert recipient's name in this format:

Joshua  
Joshua Randall Jr.  
Joshua Q. Randall Jr.  
Mr. Josh Randall Jr.  
Mr. Josh Q. Randall Jr.  
Mr. Joshua Randall Jr.

☒ Insert company name

☒ Insert postal address:

☐ Never include the country/region in the address  
☐ Always include the country/region in the address  
☐ Only include the country/region if different than:

review

Mr. Joshua Randall Jr.  
Blue Sky Airlines  
1 Airport Way  
Kitty Hawk, NC 27700

Match Fields... OK Cancel

**Mail Merge**

**Arrange your labels**

If you have not already done so, lay out your label using the first label on the sheet.

To add recipient information to your label, click a location in the first label, and then click one of the items below.

- Address block...
- Greeting line...
- Electronic postage...
- Postal bar code...
- More items...

When you have finished arranging your label, click Next. Then you can preview each recipient's label and make any individual changes.

**Replicate labels**

You can copy the layout of the first label to the other labels on the page by clicking the button below

Update all labels

**Step 4 of 6**

- Next: Preview your labels
- Previous: Select recipients

Page 1 Sec 1 1/1 At 0.8" Ln 1 Col 1 REC TRK EXT OVR

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# Step 5 of 6 - Preview your labels

**Document2 - Microsoft Word**

File Edit View Insert Format Tools Table Window Help

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**Mail Merge**

**Preview your labels**

Some of the merged labels are previewed here. To preview another label, click one of the following:

<< Recipient: 1 >>

[Find a recipient...](#)

**Make changes**

You can also change your recipient list:

[Edit recipient list...](#)

When you have finished previewing your labels, click Next. Then you can print the merged labels or edit individual labels to add personal comments.

TE BARRINGER DODCREEK OAKS #2505 HEIGHTS, CA 95621	AMY BIRMINGHAM 1137 ATHENA AVENUE SACRAMENTO, CA 95825	RAYMOND BROOKS 1259 34TH ST SACRAMENTO, CA 95823
AVARIN RRAN AVE MENTO, CA 95831	MILDRED DAVALOS 200 SCHUERLE ST ALAMEDA, CA 94501	KIMBERLY ELLIS 2222 SYCAMORE LANE #36 SACRAMENTO, CA 95823
ARIE HAYES TH AVE DA, CA 95673	TAMEKA HAYES 2708 DANUBE AVE ALTADENA, CA 91001	SARAH HO 2900 SOUTH MEADOWS PL APT. A ROSEVILLE, CA 95678
A HUMPHRIES STREET TO, CA 95351	MAUREEN KAZANCHUK 3309 UNION SPRINGS WAY FOLSOM, CA 95630	JUSTIN LIANG 3834 9TH AVE NEVADA CITY, CA 95959
TTI MOUA ENTEL WAY MENTO, CA 95831	KIMBERY NGUYEN 5208 52ND AVE TURLOCK, CA 95382	JOHN PHANG 5920 GROVE AVENUE APT B SACRAMENTO, CA 95832
Y REYNOLDS LAX AVENUE MENTO, CA 95828	YEVGENIY SU 755 SOUTHGATE DRIVE SACRAMENTO, CA 95822	JAMIE SY 7574 PINON WAY OAKLEY, CA 94581

Page 1 Sec 1 1/1 At 0.9" Ln 3 Col 25 REC TRK EXT OVR

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**Step 5 of 6**

Next: [Complete the merge](#)

Previous: [Next wizard step](#) [els](#)